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## **Software Help Sheet 13:**

## **ADCRC Service Delivery**

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# **SAMS ADCRC Service Delivery Summary**

ADCRC providers have requested a document that will assist them in their service delivery of ADCRC units and subsequent invoicing. This help sheet provides step-by-step instructions on how to accomplish this task. This document will cover only the functionality of the SAMS system any program related questions need to be addressed to the appropriate CSS program analyst.

ADCRC providers have the capability of requesting reimbursement for services that are not tied to a unit rate as are other services in the SAMS system. The California Department on Aging (CDA) has made it mandatory that all ADCRC providers input all consumer service delivery units into the system for transmission to the State. These two factors make it necessary that service delivery and reimbursement are separate functions in the system.

There are eight ADCRC consumer service delivery items and three ADCRC invoice reimbursement items in the SAMS system. The eight service delivery items have a unit price of \$0.00 while the reimbursement items do have a unit price. The unit price is variable to allow contract agencies the ability of inputting the actual unit cost of delivered service units. Please note that although the Federally funded components are not as detailed as the CBSP funded components, they still cover the same services. The reason that the CBSP funded components are so detailed is that CDA is asking for this level of detail while the Federal government does not.

## **ADCRC Consumer Service Delivery Items**

### **CBSP Funded**

1. CBSP ADCRC Community Education Sessions
2. CBSP ADCRC Support Group Sessions
3. CBSP ADCRC Counseling Families of Patients Hours
4. CBSP ADCRC Day Care Participant Days
5. CBSP ADCRC Volunteer Time Hours
6. CBSP ADCRC Volunteers

### **Federally Funded**

7. III-B ADCRC Days
8. III-E Respite Out-of-Home Day

## **ADCRC Invoice Reimbursement Items**

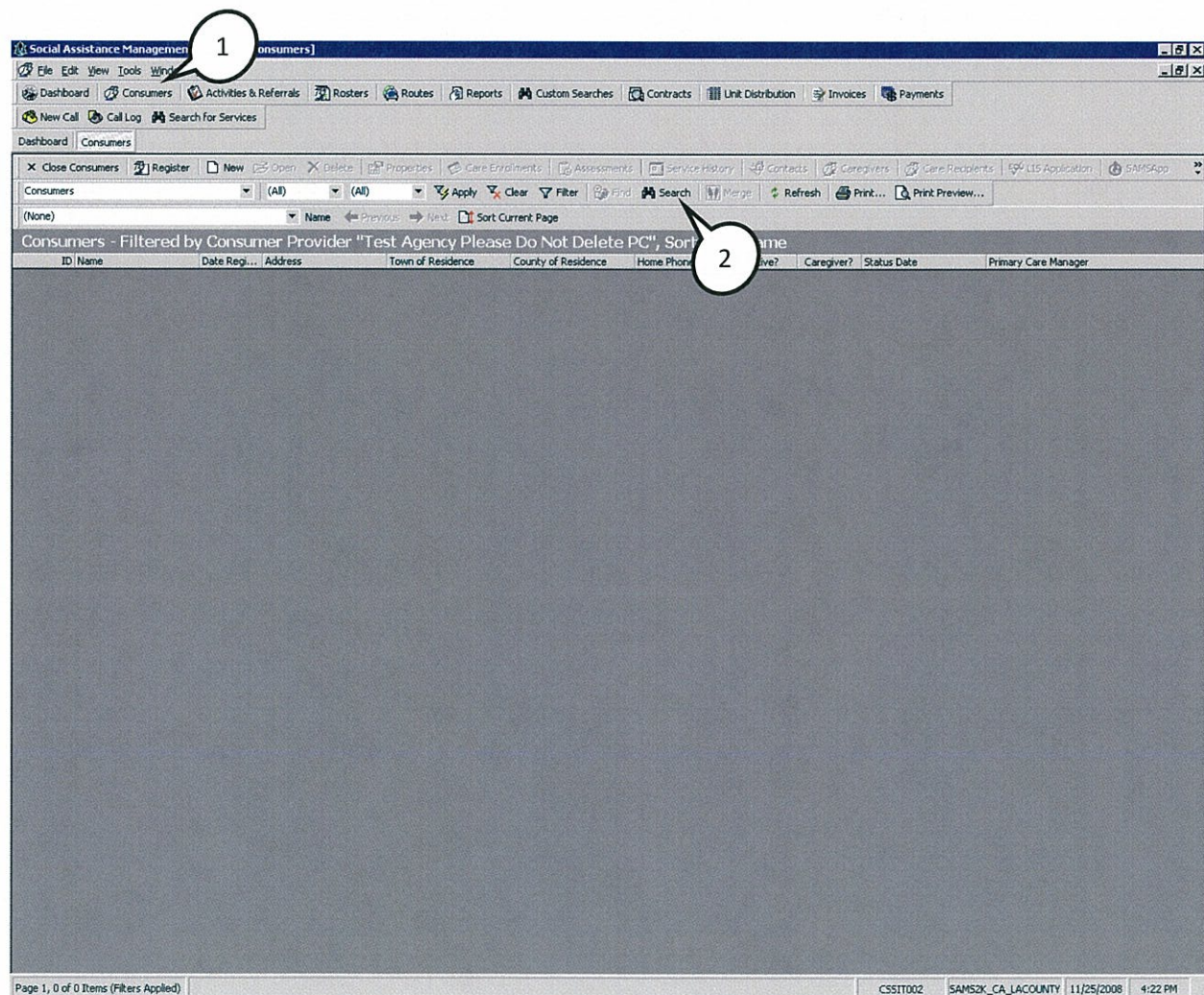
1. CBSP ADCRC Dollars to be Reimbursed
2. III-B ADCRC Respite Dollars to be Reimbursed
3. III-E ADCRC Dollars to be Reimbursed



## ADCRC Consumer Service Delivery Items

Following are the necessary steps that need to be taken to deliver the ADCRC Service Items. These items do **not** have a unit rate. These components are in the system to track the provider's service delivery, reimbursement is a separate transaction.

1. Locate the consumer for whom you are delivering a service by selecting **Consumers** from the SAMS main menu.
2. Use the **Search** feature to find the consumer.



3. The next step is to enroll that consumer in the necessary ADCRC programs. To accomplish this task you need to open **Details** under the selected consumer.

The screenshot shows the 'Social Assistance Management System - [CSS Test, AAA - Consumer]' window. The 'Details' tab is selected, showing a form with various fields. The left sidebar contains a 'Contents' menu with 'Details' highlighted. The 'General' section of the details view includes a list of links, with 'Care Enrollments (2)' highlighted. The 'Personal' section contains fields for Prefix, First Name, MI, Last Name, Suffix, Maiden Name, AKA Name, Date Registered, Consumer Details Last Reviewed, Marital Status, Gender, Birth Date, SSN, Info Release Authorized, and Default Agency. The 'Area Code' field is also visible.

Personal	
Prefix	
First Name	AAA
MI	
Last Name	CSS Test
Suffix	
Maiden Name	
AKA Name	
Date Registered	07/01/2008
Consumer Details Last Reviewed	11/20/2008
Marital Status	
Gender	
Birth Date	
SSN	
Info Release Authorized	No
Default Agency	Los Angeles County AAA
Area Code	
Home Phone	
Residential Address	
Mailing Address	
NAPIS	
Status	
Insurance	
Other	
Characteristics	

4. Select **Care Enrollments**.



5. **Add** a care enrollment for (a) ADCRC (Federal) and (b) ADCRC (State) see below. Ensure that the dates are all the same and that they are on or before your service delivery date

**Edit Care Enrollment** 5a

Details:

Level of Care	Federal Administration on Aging
Service Program	ADCRC (Federal)
Care Program Name	ADCRC (Federal)
Application Date	07/01/2008
Received Date	07/01/2008
Termination Date	
Status	Active
Reason	
Status Date	07/01/2008
Start Date	07/01/2008
End Date	

OK  
Cancel

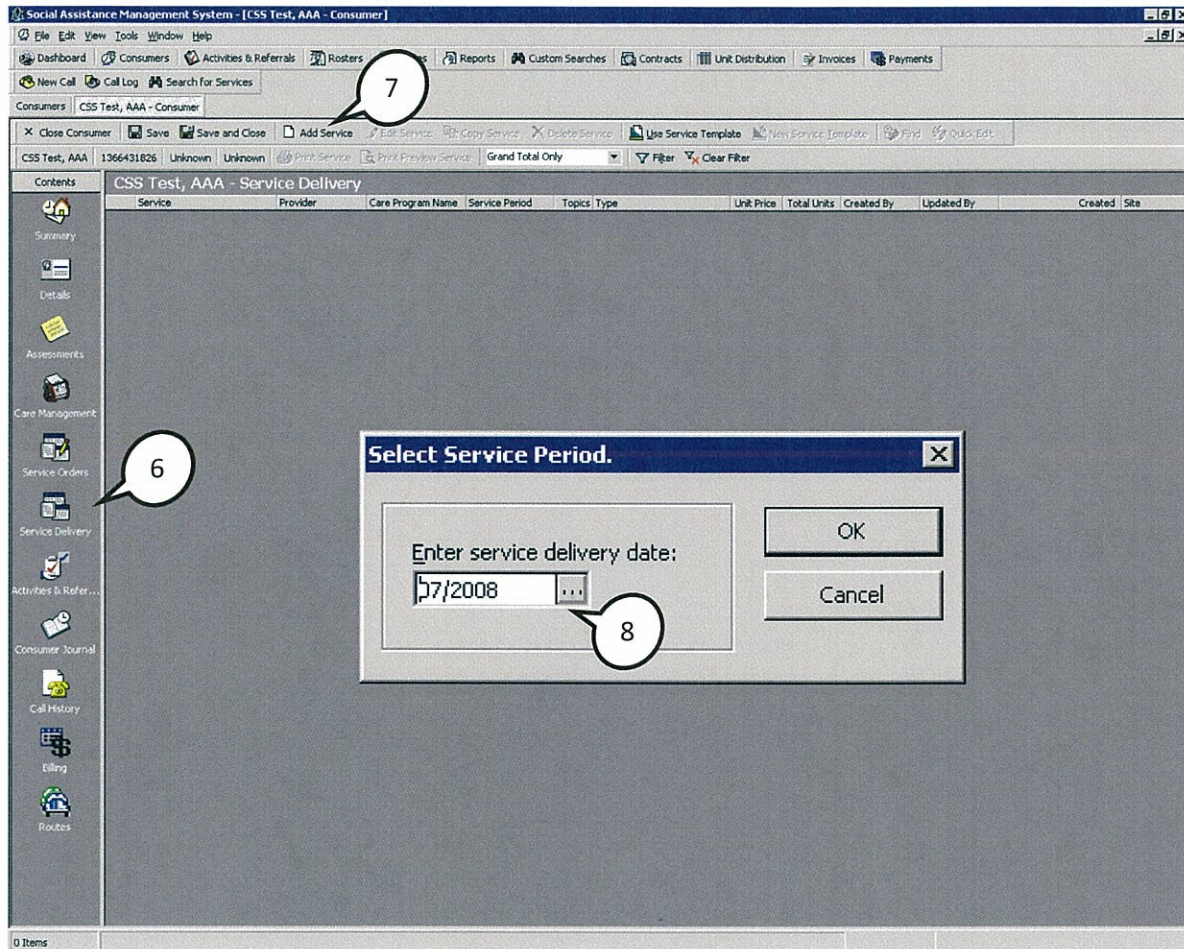
**Add Care Enrollment** 5b

Details:

Level of Care	State Community Based Service...
Service Program	ADCRC (State)
Care Program Name	CBSP ADCRC (State)
Application Date	07/01/2008
Received Date	07/01/2008
Termination Date	
Status	Active
Reason	
Status Date	07/01/2008
Start Date	07/01/2008
End Date	

OK  
Cancel  
Add Next

6. Select **Service Delivery** from the icons on the left side of the screen to show a service delivery.
7. Select **Add Service**.
8. Select the correct month of service delivery and click **OK** the service delivery detail screen will appear.





9. Select the appropriate **Care Program** (State or Federal). The drop down for the services will be limited to those under each program.
10. Add the correct **Fund Identifier**.
11. Add yourself as the **Provider**.
12. Input the **Units** of service.
13. Select **Daily Unit Details**, a calendar will appear and then put a "1" on the calendar indicating the date of service delivery.

Note: the services delivered to the consumer will not have a reimbursement value. For reimbursement the next section process must be followed.

**Social Assistance Management System - [CSS Test, AAA - Consumer]**

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts Unit Distribution Invoices Payments

New Call Call Log Search for Services

Consumers CSS Test, AAA - Consumer

X Close Consumer Save Save and Close Add Service Edit Service Copy Service Delete Service Use Service Template New Service Template Find Quick Edit Apply X Close

CSS Test, AAA 1366431826 Unknown Unknown Print Service Print Preview Service Grand Total Only Filter Clear Filter

**Contents** CSS Test, AAA - Service Delivery

Service	Provider	Care Program Name	Service Period	Topics	Type	Unit Price	Total Units	Created By	Updated By	Created	Site
Service Delivery											
Care Program											
Service Category											
Service											
Subservice											
Fund Identifier											
Topics				(0 Items)							
Service Month			07/2008								
Agency		Los Angeles County AAA									
Provider											
Subprovider											
Caregiver											
Care Recipient											
Site											
Place of Service											
Units			1.00								
Unit Price			\$0.00								
Daily Unit Details			(0 Items)								
Total Cost			\$0.00								
Caregiver Service Delivery											
Diagnosis Code											
Service Order			(None)								
Comments											

0 Items

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## Delivery of ADCRC Reimbursement Items

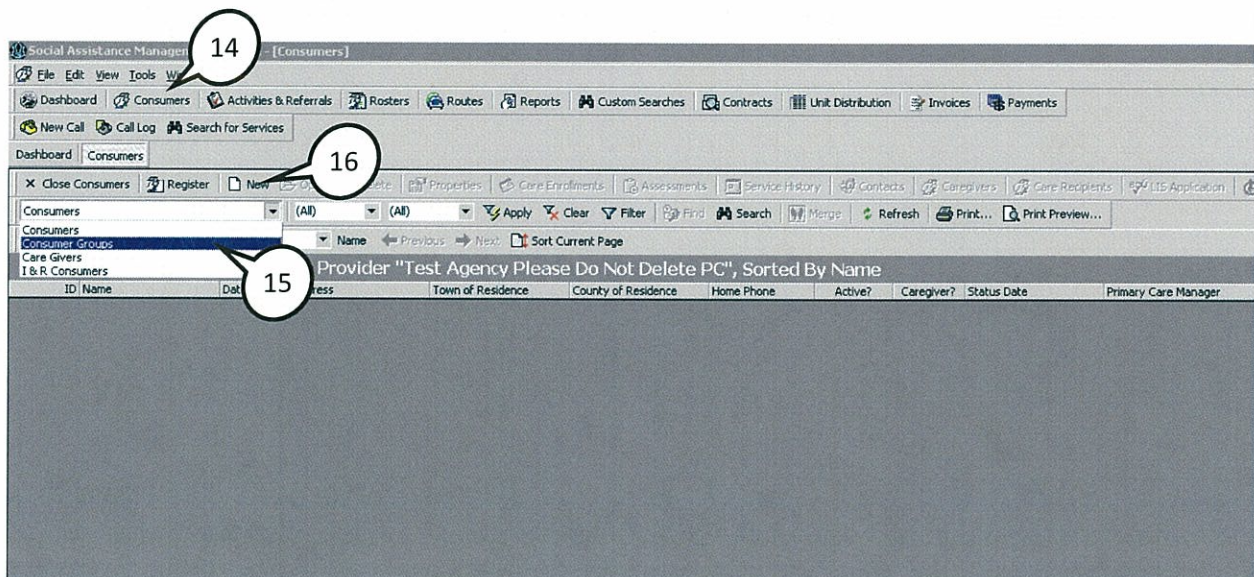
Due to the complexity of the ADCRC program the following processes need to be complete for a reimbursable component to be entered in the system. ADCRC providers need only provide an amount and funding stream to be reimbursed.

Entry of the "ADCRC Consumer Service Delivery Items" (instructions in previous section) **must occur** prior to taking the following reimbursement steps.

14. From the SAMS Main Menu select **Consumers**.

15. You will be creating a consumer group for the billable amount. Select **Consumer Groups** from the drop down menu.

16. Select **New**.





17. Add a name to your consumer group (not pictured).
18. Ensure that the **Date Registered** is on or before the delivery of the service
19. Add the **Care Enrollments**

The screenshot shows the Social Assistance Management System (SAMS) interface. The title bar indicates the window is titled "Social Assistance Management System - [Untitled - Consumer Group]". The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for Dashboard, Consumers, Activities & Referrals, Rosters, Routes, Reports, Custom Searches, Contracts, Unit Distribution, Invoices, and Payments. The breadcrumb trail shows Dashboard > Consumer Groups > Untitled - Consumer Group. The main content area is titled "Untitled - Details" and contains a form with several tabs: General, Personal, Residential Address, NAPIS, Status, Care, and Characteristics. The "General" tab is currently selected. The "Personal" section of the form includes fields for Description, Date Registered (11/25/2008), Gender, and Age. The "Residential Address" section includes fields for NAPIS, Status, and Care. The "Care" section includes a field for Characteristics. The left sidebar contains a "Contents" panel with icons for Summary, Details, Service Orders, Service Delivery, Activities & Referrals, and Consumer Journal. A callout bubble labeled "18" points to the "Date Registered" field in the "Personal" section. Another callout bubble labeled "19" points to the "Care Enrollments (1)" section in the left sidebar.

Field	Value
Description	
Date Registered	11/25/2008
Gender	
Age	
NAPIS	
Status	
Care	
Characteristics	

Contents

- Summary
- Details
- Service Orders
- Service Delivery
- Activities & Referrals
- Consumer Journal

Untitled - Details

- General
- Personal
- Residential Address
- NAPIS
- Status
- Care
- Characteristics

18

19

CSST002 SAMS2K\_CA\_LACOUNTY 11/25/2008 4:39 PM

20. Select **Service Delivery** to add a service to the selected consumer group.
21. Select the appropriate **Care Program** (State or Federal) The drop down for the services will be limited to those under each program You must enter one of the three reimbursable services.
22. Enter the correct **Fund Identifier**.
23. Enter yourself as the **Provider**.
24. Input the **Units** of service usually "1".
25. Enter the **Unit Price** as the total reimbursement.
26. Enter the date of the service delivery by selecting **Daily Unit Details**. Entering a "1" on the last day of the calendar for the appropriate month. Note: only enter **one date** for the service delivery date even though this may be a consumer group with many dates of service delivery for this month.
27. The **Total Cost** will then appear correctly. You must enter one of the three reimbursable services.

The screenshot shows the 'Service Delivery' form in the SAMS system. The form is titled 'CSS Test, AAA - Service Delivery'. The left sidebar contains a 'Contents' menu with items like Summary, Details, Assessments, Care Management, Invoice Orders, Service Delivery, Activities & Refer..., Consumer Journal, Call History, Billing, and Routes. The main form area has a table with columns: Service, Provider, Care Program Name, Service Period, Topics, Type, Unit Price, Total Units, Created By, Updated By, and Created Site. The table contains one row of data. Callout boxes 20 through 28 point to the following elements:

- 20: Service Delivery menu item in the left sidebar.
- 21: Care Program dropdown menu.
- 22: Fund Identifier field.
- 23: Provider field.
- 24: Units field.
- 25: Unit Price field.
- 26: Daily Unit Details field.
- 27: Total Cost field.
- 28: Save and Close button in the top menu bar.

Service	Provider	Care Program Name	Service Period	Topics	Type	Unit Price	Total Units	Created By	Updated By	Created Site
Care Program	Los Angeles County AAA	07/2008	(0 Items)			1.00	\$0.00			

28. Select **Save and Close** from the menu.